



Literary Journal Institute/CLMP

CIRCULATION DATABASE TEMPLATE, VERSION 2

Template Features:

- Template is cross-platform and operates in conjunction with FileMaker Pro (version 5.0 and up).
- Comprehensive manual provides step-by-step guidance and walks users through the conversion/data importing process.
- Accommodates any frequency or numbering/indexing scheme for issues, including seasonal expirations, e.g., "Winter 2005."
- Organizes subscriptions according to types, e.g., standard, libraries, complimentary.
- Handles gift subscriptions, with personalized acknowledgments to givers and recipients
- Records financial details for each order, including donation income.
- Keeps historical records of transactions.
- Allows bill-me's and includes a preformatted invoice series.
- Checks for duplicates as you enter data and retroactively.
- Prints current subscriber labels or exports names to a file for mailing current issue.
- Allows importing of new and renewal subscriptions from online orders or other external sources.
- Prints groups of shipping forms with appropriate acknowledgments and/or shipping labels.
- Prints a form, label, invoice, thanks, or envelope for a single record.
- Prints current subscriber labels or exports names to a file for renting the subscriber list.
- Produces deposit logs, giving totals for checks, cash, and credit cards.
- Four preformatted renewal letters for standard subscribers; three renewal letters for gift subscription givers; one renewal/invoice for libraries.
- Option to send emails to selected groups of subscribers.
- Tracks and reports on conversions and renewals.
- Tracks and reports on sources of new subscriptions, renewals, and donations.
- Keeps information on donors and shows totals donated by each subscriber.
- Tracks and reports on individual donor activity and on donation income by source.
- Validates credit card numbers.
- Creates comma-delimited files to transfer credit-card transactions electronically to your bank.

Please note:

A working knowledge of FileMaker Pro is strongly recommended for prospective users. The template is recommended for magazines with no more than 10,000 subscription records. It does not handle back issue and/or ancillary sales. CLMP cannot provide users with any technical assistance or support beyond the manual and ensuring the files are received in good condition, and assumes no responsibility for the loss of data during the conversion process or any other problems encountered in day-to-day use. Importing your existing data into the template may be time-consuming and you may need professional, paid assistance. Please keep a copy of the original template files as you would with any other software package.